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ABSTRACT

The document examines, defines, and suggests approaches for using the case study method in teaching global development studies. The paper is presented in three parts. Part I defines global development studies as "an academic course of study that encourages students to develop a rational, systematic approach to complex global issues." The objectives are to synthesize what is known about the modern world from a wide variety of academic disciplines and to provide a tool for the development and practice of basic skills. This part also defines and lists the advantages of using the case method. Part II examines three types of case studies: the global country case study, the global issue case study, and the local case study. It also recommends that the case study course be an outgrowth of a development theory course and lists skills developed in the case study course, including reading, writing, listening, discussion, reasoning, problem solving, and analysis and synthesis. Part III discusses the case study, and teaching methods which will encourage skill reinforcement. A briefly annotated bibliography of books, audiovisual materials, simulation games, and global organizations concludes the document. (CK)

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THE GLOBAL CASE STUDY

An Occasional Paper

I. INTRODUCTION

A. Global Development Studies

Global Development Studies is an academic course of study that encourages students to develop a rational, systematic approach to complex global issues, e.g. food, energy, environment, population, trade, national security, health, and unemployment. It also provides a tool for the development and practice of basic skills. Its key objective is to pull together what is known about the modern world from a wide variety of academic disciplines, such as history, economics, anthropology, into a comprehensible whole. Many sources including books, journals, texts, periodicals, and other media are used to accomplish this objective. Since global studies involves largely the analysis of current information about issues and nations, the case method of study, which favors this approach, is particularly useful.

B. The Case Study Method and Global Development Studies

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The case study of a developing country or of a global issue is usually an original academic inquiry into real situations that affect students' lives. Together with a case study approach that avoids the use of a text, encoourages the consideration of all options and solicits and respects students' informed opinions, this focus on reality makes the case study attractive for classroom procedure.

The principal advantage for students in learning about the world via the case study method is the development of skills for dealing with social

issues and for making decisions based on the assessment of fact. The case method of instruction requires students to participate actively in problem-solving while learning about issues and nations. The student receives a case, usually in the form of a report, evaluates the problem and decides upon policies for action based on the examination of alternatives. A case study exercise concludes with policy recommendations prepared by the students as a demonstration of their problem-solving and decision-making skills. In lieu of the prepared case study, the teacher and students may compile their own tables of data from which to draw conclusions about global issues.

Because case studies are based on the evaluation of data, the approach to problem-solving is deductive (drawing conclusions from facts) and this important thinking skill is developed. Students learn that decisions must often be based on incomplete data, that they must often find their own answers to problems and that they must often deal with "what is," rather than "what ought to be." They learn that there is no text book for global studies and that learning is an ongoing process directly involving their own lives. Finally, the case study method offers students the opportunity to learn how to deal with change and develop confidence in their ability to understand and cope with the major issues of the day.

II. THE CASE STUDY--WHAT IS IT?

A. Types

1. Global Country Case Study

The global country case study traces the development of a nation in terms of its history, geography, social structure, culture, national priorities and other important variables. The central theme is the interrelationship of the country with the world beyond its borders and how that interrelationship has influenced the country's development. The country case study includes data about economic and social development such as gross

national product (GNP), birth and death rates, literacy rates, hospital beds per thousand of population, etc. The focus is on the development process, how the process affects people, and how it has been affected by contacts with the larger world.

The country case study includes an examination of options for the future development of a country, but does not claim a preference for any of these plans, leaving the student free to make and support his or her own decisions as part of a final class exercise. The country case study, written in an objective tone, presents the facts about a nation and its development while avoiding a "we-they" outlook ("we" Americans are better than "they", the poor people) toward other cultures.

2. Global Issue Case Study

The global issue case study is the study of an international issue from all representative viewpoints: north-south, east and west, rich and poor, developed and underdeveloped, etc. Global issues are those recognizing no national boundaries and requiring international cooperation for control or solution. They include the issues of food supply, energy policies, human rights, environmental pollution, and urbanization. The issue case study introduces the nature of the problem, the record of world awareness of the issue, how the problem affects different peoples, how the issue interconnects with other issues, and alternative proposals to deal with the problem. The ideal global issue study contains up-to-date comparative data about the problem, explores future trends vis-à-vis present policies, and lists options for international cooperation to resolve the issue.

3. Local Case Study

On a more modest scale, students may systematically investigate the ties of the local community to the larger world. This type of inquiry will have to be conducted by the teachers and students themselves. It involves the study of local newspapers, businesses, churches, and other organizations and locally available products for international connections. A study of the development of the students'

home town or region can reveal some of the same forces that are at work on the international level and also promote the inquiry skills that are inherent in the case study method.

B. Context of the Case Study

1. Prerequisite to a Case Study

The case study of a particular nation's development or of a particular global issue should be an outgrowth of a development theory course. This prerequisite course need be neither complicated nor overly difficult, but should clearly delineate the following: basic geographic and economic terms; economic and social development indicators; outlines of critical development issues; the need for basic infrastructure and the importance of technology; development factors and constraints; and the opportunity to experience, in a simulated exercise, development planning procedures.

The ideal course in global studies covers a full year, roughly divided into one semester of theory and a second semester of case study work in which the theory is applied to real situations. Schools with conflicting course commitments, budget restrictions, and other hindrances to a semester-length theory course should consider offering a short theory course (half a semester) or including, within a case study course of a country or a global issue, some discussion of theory. Where even this is precluded, elements of the study of development theory can be infused into existing courses.

2. Basic Skills

To meet the needs of today's students, global education provides excellent opportunities for the development and reinforcement of skills including: reading from diverse sources; writing essays, reports, and exams (all of which should be corrected to conform with common usage and spelling rules); researching to include researching data from multinational corporations, libraries and community organizations; discussing in large and small groups; and audio-visual listening and reporting.

Global education, including the case study method, leads to the development and practice of the higher academic skills of analysis and synthesis as well. The case method is a critical-thinking, analytical method by design. Students may spend most of a semester learning to analyze data and then, with help, learning to synthesize or "put it all together," to make development decisions.

In discussing skills, it may be useful to review here the distinctions between deductive and inductive reasoning. Induction involves the development of generalizations such as concepts, rules, principles, and definitions from examples or specimens. In American history, for example, the student is expected to develop the concept of separation of powers by reading specimens or documents such as the Constitution or the Federalist papers. Deduction, on the other hand, concerns itself with the solution of perplexing difficulties by drawing inferences from previously developed generalizations including causes and effects. In global studies, the student could examine two or three solutions, for example, to the energy problem. Weighing these proposals against the facts, he would deduce the preferable solution. The case method can sharpen both skills. Students may read official documents, statements from world leaders or issue experts to form a general rule, or they may move from given general rules to determine the specific actions needed.

The chart below reviews for teachers the steps in the problem-solving method for use with the case study approach. Emphasis is on the deductive method.

Steps in the Problem-Solving Method

1. Introduction of the Problem
   A. Raising the problem--motivation, purpose
   B. Defining the problem--getting an exact idea of it
      a. observing--an overview of the data
      b. recalling past experience

2. Work on the Problem
   A. Organizing known facts, principles
   B. Advancing hypotheses for solution of problem <u>or</u> selecting procedure to be followed

C. Gathering data
   a. reading
   b. observing
   c. selecting examples, illustrations
D. Critical evaluation of data as applied to the proposed solution
E. Formulating conclusions

3. Concluding Step
   A. Checking or verifying results
   B. Application or summarization of conclusions

III. THE CASE STUDY IN THE CLASSROOM

A. Preparing the teacher

The teacher will need to prepare by reading about the country or issue students will investigate. Sources of background materials include the World Bank, Washington, D.C.; Global Learning, Inc., Montclair, New Jersey; Global Perspectives in Education, Inc.; and Global Development Studies Institute, Millbrook, New York. Good starting places for teacher reading would include Schooling for a Global Age by James Becker, Schooling and Citizenship in a Global Age: An Exploration of the Meaning and Significance of Global Education by Lee Anderson, or World Regional Geography by Paul Ward English. GDSI also has available a brief list of basic readings in development and global issues, The Global Bookshelf. The GDSI curriculum Development & Interdependence also contains a bibliography of materials for teachers and students. (See bibliography for materials and organizations).

It is particularly important for the teacher to study physical and political maps of any country proposed for study in order to become familiar with geographical details--rainfall, crop areas, exports, resources, and the names of key regions, provinces, and cities. Since the case study approach emphasizes mutual learning by both student and teacher, the teacher's lack of exhaustive knowledge about the country should not prevent the use of this approach.

Materials for global courses are not as easy to obtain as those for traditional courses, but the situation is improving. It is more important for students

to learn the method of case study than to be provided with the perfect example of it. Good case studies may be assembled from resources found in the school or in town libraries, commercial school publications, university resources, and specialized global education centers.

B. Criteria--What Should a Case Study Contain?

By way of general introduction, the country case study should provide an overview of the country, including geographical information, e.g. climate, topography, agricultural and mineral products, a discussion of the effects of geography on national development, and the factors pertaining to geography such as river flow that could be harnessed to aid development, such as hydroelectric power or water supply. Next should come a discussion of elements vital to development such as natural and financial resources, the type and quality of existing infrastructures, the nature of the country's human resources, e.g. their numbers, education, health, and motivation, the effects of particular cultural attitudes on the development process, and a discussion of the effects of the country's political structure on development. This last subtopic is vital, since most poor countries' future development must rely on timely and suitable government policy decisions. Lastly, this section should introduce the idea that development factors are not isolated phenomena, but interact continuously and that this interaction makes precise control of the process difficult.

Knowledge of the country's historical development should be the next step. This should include the building and financing of the country's infrastructure; the role of immigration, class conflict or mobility; agrarian policies and structures; foreign influences; industrialization and its effects; and adaptation to change. It is most important to include a discussion of contemporary history and culture, since most students do not understand their own era, nor have they been exposed to the process of critical reflection. It is likewise vital that students learn of the emergence of the modern sector, linked to the development of an infrastructure in the country and of any legacies of colonialism or annexation. The record of development for most African, Asian, and Latin American countries is largely incomplete without this investigation.

Since development is affected by external as well as foreign factors, an overview of the country's foreign policy is needed to complete the survey of historical processes. In development study, it is critical that the student understand how development is affected by decisions made in other countries.

The next step provides an overview of various issues in development as they affect the country under study. These would include: population size, growth, and distribution; the food issue (quality, quantity, & distribution of food); education, especially the need for basic literacy; human rights (basic human needs and civil liberties); energy (type and quantity); and environmental issues such as the quality of life and the link with the energy issue. While it would be difficult to treat all these issues in detail, a composite picture can be drawn.

Next the case study would provide an investigation of the various development planning questions and their application to the country. These questions include appropriate technology for development (bulldozers or shovels?, brain surgeons or public health workers?), rural development, industrialization, trade, public and private aid, investment, social reform policies, and a discussion of the financial, human, and natural resource constraints on development.

The global issue case study should follow the same format, that is, begin with a general overview of the issue including its history and present significance, move through a detailed examination of the various elements of the issue, and conclude with a discussion of alternative options for resolution of the problem. The GDSI case study World Food Supply, for example, is concerned with three questions: What is hunger? Why is there hunger? and What is being done about hunger? It moves the student clearly and quickly through the issue and examines different policies to alleviate hunger.

C. Using the Case Study in the Classroom

The case study uses modern teaching methods to encourage skill reinforcement. Introductory readings should be followed by a large group discussion that clarifies an issue for the group (What is hunger?

What are the development problems of Brazil?) and then by working in small groups that culminates in a congress of these groups, in which each makes a report. In respect to the hunger issue, group #1 might discuss fertilizers, group #2 might discuss proteins, carbohydrates, and other food values, group #3, farming techniques.

Other classroom activities include map study, viewing of films and sound filmstrips (with the requirement that notes be taken), and the use of simulation games. These games help stimulate interest, while at the same time they require the practice of critical thinking and decision making skills by students. Essays or research papers may be assigned as end-of-term projects, while less skilled students could be asked to make simpler reports on a single aspect of the issue or development process.

Another useful exercise is the model planning exercise in which students create a plan for the country or specific region in question. This exercise should be planned for the end of the case study course as a final demonstration of knowledge and skills acquired by students.

Other exercises might include the traditional examination, but could also take the form of field trips to appropriate government offices or development agencies, attitude surveys that measure the affective impact of the course, or an ongoing school project that would focus student attention on "development" education through such activities as the recycling of cans, paper, and bottles or conserving the use of energy in school operations.

Prepared by

Walter S. Schaeffler
July, 1979

BIBLIOGRAPHY

This bibliography contains representative citations. While all are useful, it is suggested that the teacher not feel limited to them. Citations of audio-visual materials, simulation games, and global organizations appear at the end.

Allyn & Bacon, Inc. Afro-Asian Regional Series.
Area Studies Series.
Challenges of Our Times Series.
Culture Areas in Perspective Series.
Episodes in Social Inquiry Series.
Readings in Sociology Series.
Inside World Politics.

Order from:
Allyn & Bacon, Inc.
Rockleigh, New Jersey 07647

Each series contains materials useful in country or issue studies. Inside World Politics is a collection of very useful readings about different types of political systems.

Anderson, Lee. Schooling and Citizenship in a Global Age: An Exploration of the Meaning and Significance of Global Education. Bloomington, Indiana: Mid-America Program for Global Perpsectives in Education, Social Studies Development Center, 1979. Paperback, $5.00.

A new and already essential volume for both the novice and veteran global studies teacher. Contains the entire range of global topics. Price is approximate.

Becker, James. Schooling for a Global Age. New York: McGraw-Hill Company, 1979. Hardcover, $10.00.

Order from:
McGraw-Hill Book Company
1221 Avenue of the Americas
New York, New York 10017

An excellent overview of the meaning and scope of global education. Offers nine articles by twelve leaders and defenders of global education at the pre-collegiate level. Also offers an extensive bibliography of materials for classroom use, books, and resource organizations.

American Book Company. Viewpoints in World History Series.
Order from:
American Book Company
450 West 33rd Street
New York, New York 10001

Available separately or in a bound volume, this series is composed of short booklets that "argue with themselves," presenting opposing viewpoints about such issues as the Arab-Israeli conflict, nuclear arsenals, causes of imperialism, and the effects of the industrial revolution.

Bohannan, Paul. Africa and Africans. Garden City, New York: The Natural History Press, 1964. Paperback, $2.50.
Order from:
The Natural History Press
501 Franklin Avenue
Garden City, New York 11530
An older, but still useful overview of African geography, topography, and especially, history. Good background work.

Bond, Robert D., ed. Contemporary Venezuela and Its Role in International Affairs. New York: New York University Press, 1977. Paperback, inquire about price.
Order from:
New York University Press
Washington Square
New York, New York 10003

Brown, Lester R. By Bread Alone. New York: Praeger Publishers, 1974. Paperback, $3.95.
Order from:
Praeger Publishers
111 Fourth Avenue
New York, New York 10003
An important analysis of the global food problem, explaining how the spiraling rate of population growth, plus increasing affluence, is creating a large demand for food. Discussion of programs to alleviate problem.

Brown, Lester R. In the Human Interest. New York: W.W. Norton and Company, Inc., 1974. Paperback, $3.00.
Order from:
W.W. Norton and Company, Inc.
500 Fifth Avenue
New York, New York 10036
A thorough analysis, in layman's terms, of the world population issue. Alternative strategies discussed.

Eckholm, Erik P. Losing Ground: Environmental Stress and World Food Prospects. New York: W.W. Norton and Co., Inc., 1976. Paperback, $3.95.
Order from:
W.W. Norton and Company, Inc.
500 Fifth Avenue
New York, New York 10036
A complete overview of the global environmental situation and its connection with the need to produce more food.

Eckholm, Erik P. The Picture of Health. New York: W.W. Norton and Company, Inc., 1977. Paperback, $3.95.
Order from:
W.W. Norton and Company, Inc.
500 Fifth Avenue
New York, New York 10036
Discusses the problems of the poor and the rich nations in lay terms concerning health matters. Includes a discussion of policies that could be adopted to provide better health for all.

English, Paul Ward. World Regional Geography. New York: Harper's College Press, 1977. Hardcover, $15.00.
Order from:
Harper & Row Publishers, Inc.
10 East 53rd Street
New York New York 10022
An excellent college text which discusses the development of many nations in historical terms. Topics include resources, economics, politics for each region. Most useful for teacher reference and case study preparation.

Global Development Studies Institute.
Order from:
Global Development Studies Institute
Millbrook School
Millbrook, New York 12545
Focus on Brazil - case study of national development (1977)
World Food Supply - case study of a vital issue (1976)
Energy in an Interdependent World - issue case study complete with charts and graphs (1979)
Development & Interdependence - a one-semester theory or prerequisite curriculum for global studies (1978)
Global Bookshelf - brief list of basic readings

Gwyn, Douglas & Ciekot, Jerald J. Ending Hunger: It's Possible, It's Happening. New York: American Friends Service Committee, 1979.
Order from:
American Friends Service Committee
15 Rutherford Place
New York, New York 10003
A study and simulation game kit with short readings and appropriate questions for study of this global issue.

Hammond Incorporated. Comparative World Atlas. Maps for Advanced Study. World Distribution Transparencies.
Order from:
Hammond Incorporated
515 Valley Street
Maplewood, New Jersey 07040
Hammond has a wide range of study maps available including blank maps for class work.

Harcourt, Brace, Jovanovich. The Impact of the Industrial Revolution. Textbook, $4.50.
Order from:
Harcourt, Brace, Jovanovich
757 Third Avenue
New York, New York 10017
Focuses on effects of the Industrial Revolution in England, describes effects on lives of ordinary people.

Harrison, Barbara J., ed. Learning About India: An Annotated Guide for Nonspecialists. New Delhi, India: Educational Resources Center, 1977. Paperback, $3.95.
Order from:
Director, Center for International Programs
State Education Department
University of the State of New York
Albany, New York 12230
A thorough guide to books, audio-visuals, source materials, and museum collections on India and its culture.

Heath, D.C., and Company. Problems of American Civilization and Problems in European Civilization Series.

Order from:
D.C. Heath and Company
125 Spring Street
Boston, Massachusetts 02173

Paperback books that present the views of six to eight leading authorities on issues related to development. Not all titles in catalogs useful.

Heinemann Educational Books, Inc.

Order from:
Heinemann Educational Books, Inc.
4 Front Street
Exeter, New Hampshire 03833

Heinemann is a respected British educational publisher entering the American market. They have available excellent, inexpensive case studies and geography materials too numerous to list here. Write for history and geography catalogs.

Holt, Rinehart, and Winston, Inc.

People, Places, and Change: An Introduction to World Cultures.
Comparative Economic Systems.
Tradition and Change in Four Societies.

Order from:
Holt, Rinehart, and Winston, Inc.
CBS, Inc.
383 Madison Avenue
New York, New York 10017

Materials that more closely imitate a case study approach than most. Useful in skill development.

Keohane, Robert O. & Nye, Joseph S. Power & Interdependence: World Politics in Transition. Boston: Little, Brown, and Company, 1977. Paperback, write for price.

Order from: Little, Brown, and Company
Boston, Massachusetts 02173

An excellent, if detailed, overview of growing global interdependence for the teacher and better students.

Merrill, Charles E., Publishing Company. Latin America: The Emerging Lands and The Middle East: Crossroads of Civilization.

Order from:
Charles E. Merrill Publishing Company
1300 Alum Creek Road
Columbus, Ohio 43216

Excellent overviews of the history and culture of each region. Upper high school level texts, they do not investigate modern development in depth.

Praeger Publishers. Praeger Special Studies.

Order from:
Praeger Publishers
383 Madison Avenue
New York, New York 10017

A massive collection of specialized studies about countries and development issues, mostly for the teacher, but also for the better high school and college student.

Prentice-Hall, Inc. World Culture Series.

Order from:
Prentice-Hall, Inc.
Educational Books Division
Englewood Cliffs, New Jersey 07632

Six separate paperback texts focusing on major concepts as they operate within a specific culture--diversity, change, nationalism, revolution, rising expectations.

Sadlier-Oxford, Inc. Map Paks.
Regions of Our World Series.

Order from:
Sadlier-Oxford, Inc.
11 Park Place
New York, New York 10007

Maps related to Third World areas and paperback texts that include history, geography, present-day problems, living patterns, and cultural heritage.

Scott, Foresman, and Company. People in Our World Series.
The Developing World: Poverty, Growth, and Rising Expectations

Order from:
Scott, Foresman, and Company
1900 East Lake Avenue
Glenview, Illinois 60025

The Developing World is an excellent introduction to the problems and issues of development and has been successfully used as the basis for the "theory" or prerequisite course mentioned in this paper.

U.S. Committee for UNICEF. Guatamala Information Kit #1029
Nutrition Information Kit #1032

Order from:
U.S. Committee for UNICEF
331 East 38th Street
New York, New York 10016

Introductions to the nation and the issue, useful from grade school through high school.

World Bank. Growth and Poverty in Developing Countries.
Two Studies of Development in Sub-Sahran Africa.
World Development Indicators.
Yemen Arab Republic: Development of a Traditional Economy.
World Development Atlas.

Order from:
The World Bank
1818 H Street, N.W.
Washington, D.C. 20433

These are only a sampling of materials available from the World Bank. The tables of indicators would be a fine place to begin a "home-made" case study. The prepared case studies range from the complete to the complex, but motivated, prepared students could cope with them and learn. The "Atlas", published annually, is available free of charge and a true skills-teaching tool. Write for "Catalog, World Bank Publications, 1979."

AUDIO-VISUALS & SIMULATION GAMES

Educational Audio-Visual, Inc.
Pleasantville, New York 10570

EAV produces excellent and varied sound filmstrips on an entire range of topics, including development and global studies issues.

Guidance Associates, Inc.
Communications Park
Box 300
White Plains, New York 10602

Guidance Associates also produces excellent and varied sound filmstrips on a par with EAV, including the Global Emergency Series.

Harwell Associates, Inc.
P.O. Box 95
Convent Station, New Jersey 07961

Simulation games including Newtown which teaches the mechanics of city planning.

Interact
Box 262
Lakeside, California 92040

Excellent, inexpensive simulation games in a very wide variety.

Interculture Associates
Box 277
Thompson, Connecticut 06277

Folk, international and ethnic music records.

GLOBAL ORGANIZATIONS

Global Development Studies Institute
Millbrook School
Millbrook, New York 12545
Publications for the teacher & student, including curricula and case studies. Focus high school & college.

Global Learning, Inc.
40 South Fullerton Street
Montclair, New Jersey 07042
Publications for global education; focus grades K-12.

Global Perspectives in Education, Inc.
218 East 18th Street
New York, New York 10003
Publications for teacher & student, especially Intercom.